Volume

1

Expedient User Manual – Getting Started

Gavin Millman & Associates Pty Ltd
281 Buckley Street
Essendon VIC 3040
Phone 03 9331 3944 • Web www.expedientsoftware.com.au

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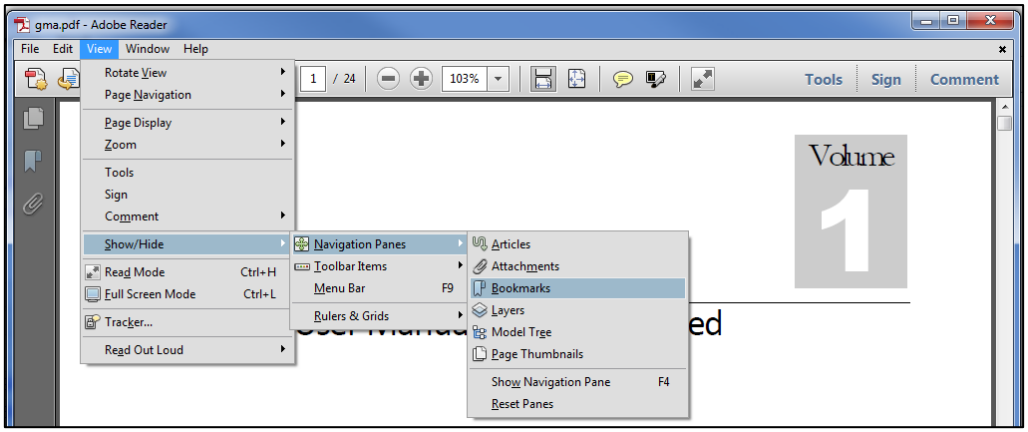
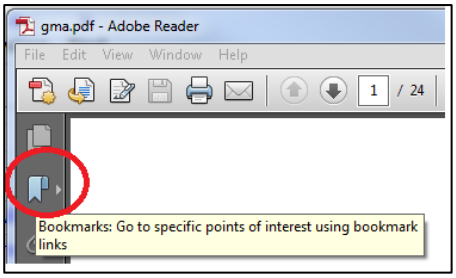
INTRODUCTION

EXpedient software supports the Customs, Forwarding, Logistics industry. This document aims to assist new users navigate through the system. Various Icons, Symbols which are prevalent throughout the system will be highlighted in this document with an explanation of what each performs.

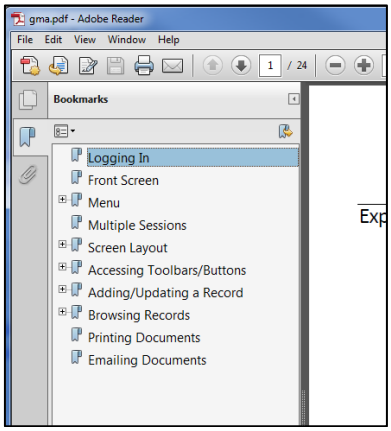
Please Note: *GMA Recommends using Adobe PDF Reader. To get the best results in viewing Expedient User Manuals, turn the Bookmarks Navigation on to see the Bookmarks for each topic Heading. See below:*



Once this is set, then click on the below:



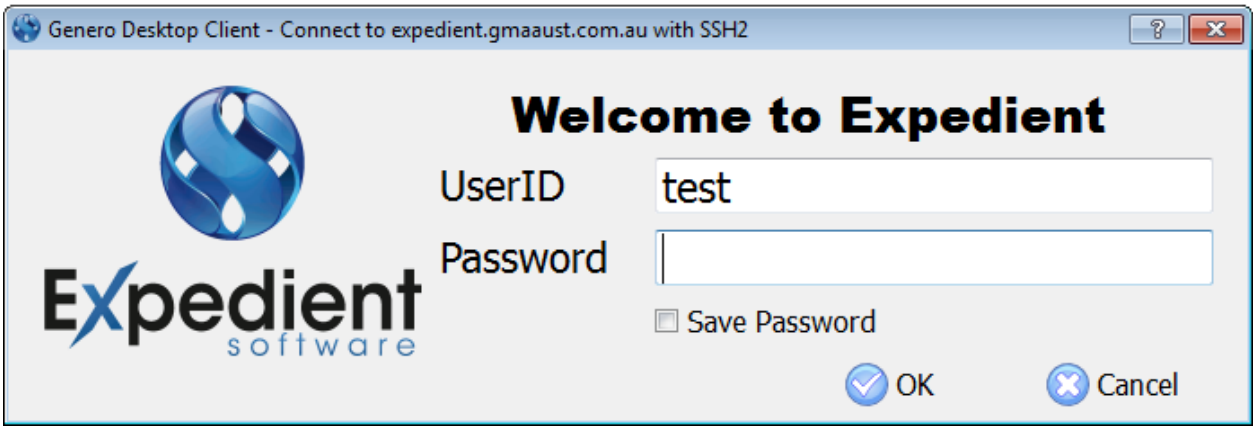
See below:



Logging In

On your desktop will be an Icon which looks this:

Double click on this icon. This will then open up the Expedient Application at a log in prompt:



To login, type in the user name and password that you were given by your manager or IT Staff Member.

To Sign In:

1. Enter your User Name and Password and press OK. Do not share your username and password with others
2. The Save Password option is disabled by default.

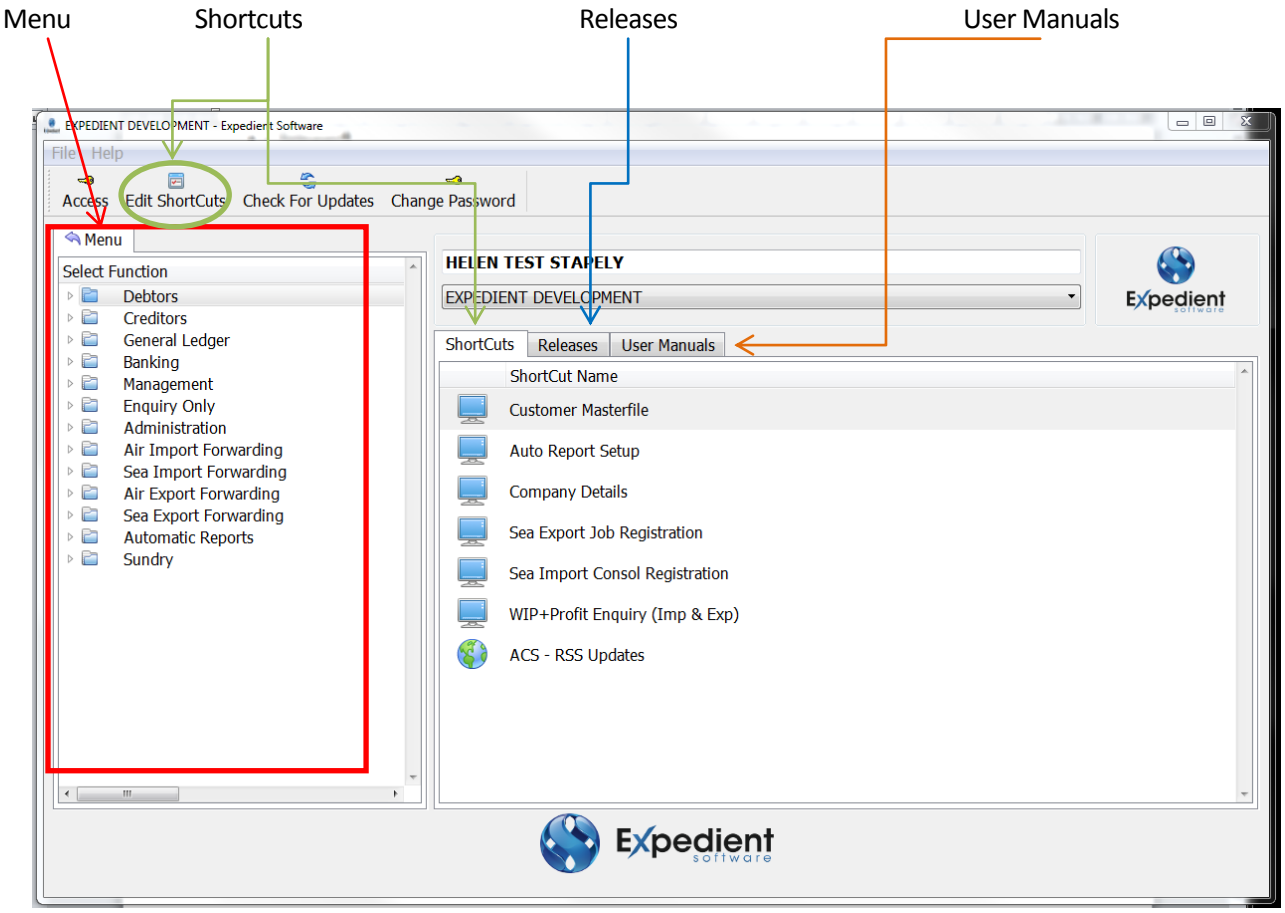
Forget your Username and/or Password?

Remember to store your password somewhere safe in the event that you forget it.
Your manager or a user with Super User Permissions will be the only person that can reset your password. This is performed in the Users Masterfile and is described in the Administrator User Manual

Main Menu

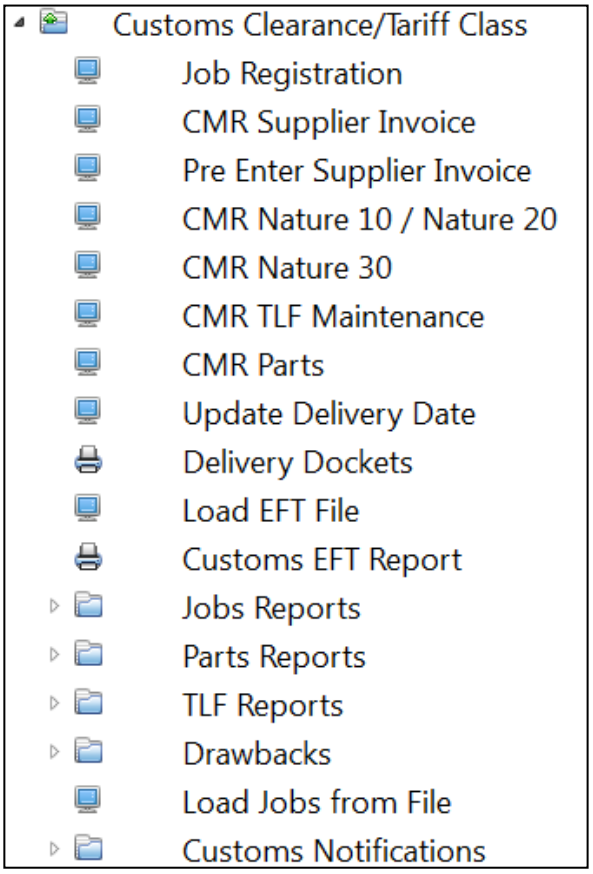
Once you have successfully logged in you will be presented with the Expedient Main Menu and Dashboard. This screen will vary based on the Modules your company has subscribed to. The screen is divided into five sections,

- Menu
- Shortcuts
- Releases
- User Manuals
- Communication Banner



Menu

The menu structure is based off the windows tree view. Each Menu item with a folder icon can be collapsed to view the sub menus within each menu function. See below:



Icons

This symbol represents a folder that contains sub folders/programs that **has not** been opened.

This symbol represents a folder that contains sub folders/programs that **has** been opened.

This symbol represents an input **screen**, for data entry

This symbol represents a **print** function, e.g.: a report or a document print.

This symbol represents a **posting/prepare** function, e.g.: posting monies to the general ledger.

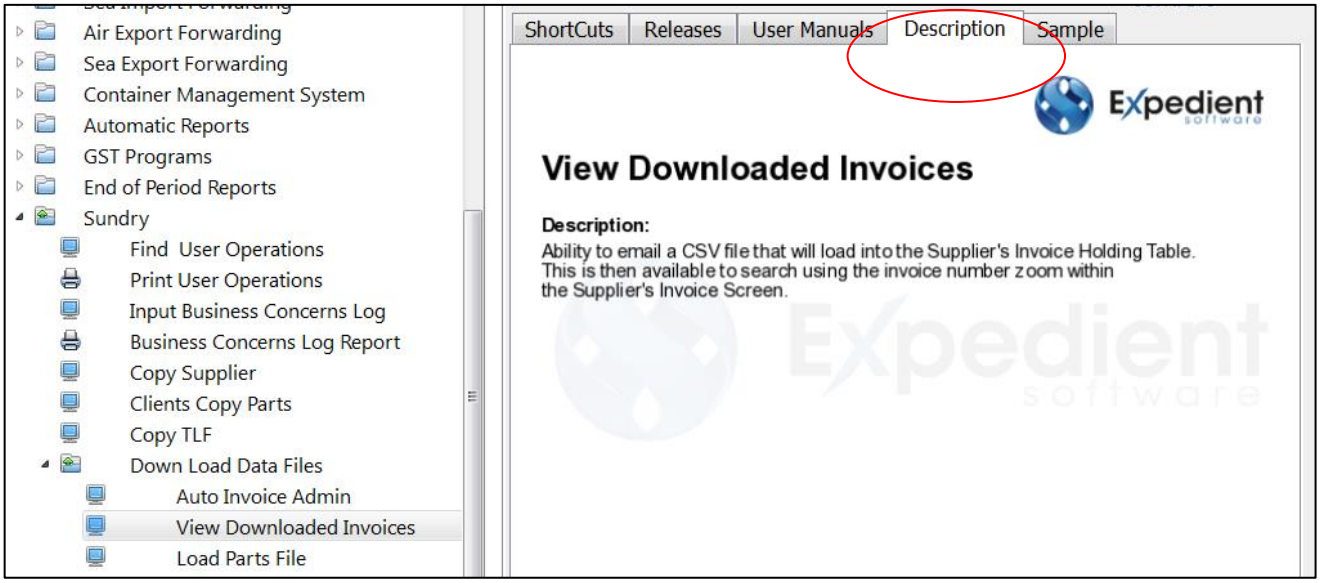
This symbol represents a **function**, e.g.: check to see if all items have been posted.

Menu This symbol collapses all Main Menu Items on one click.

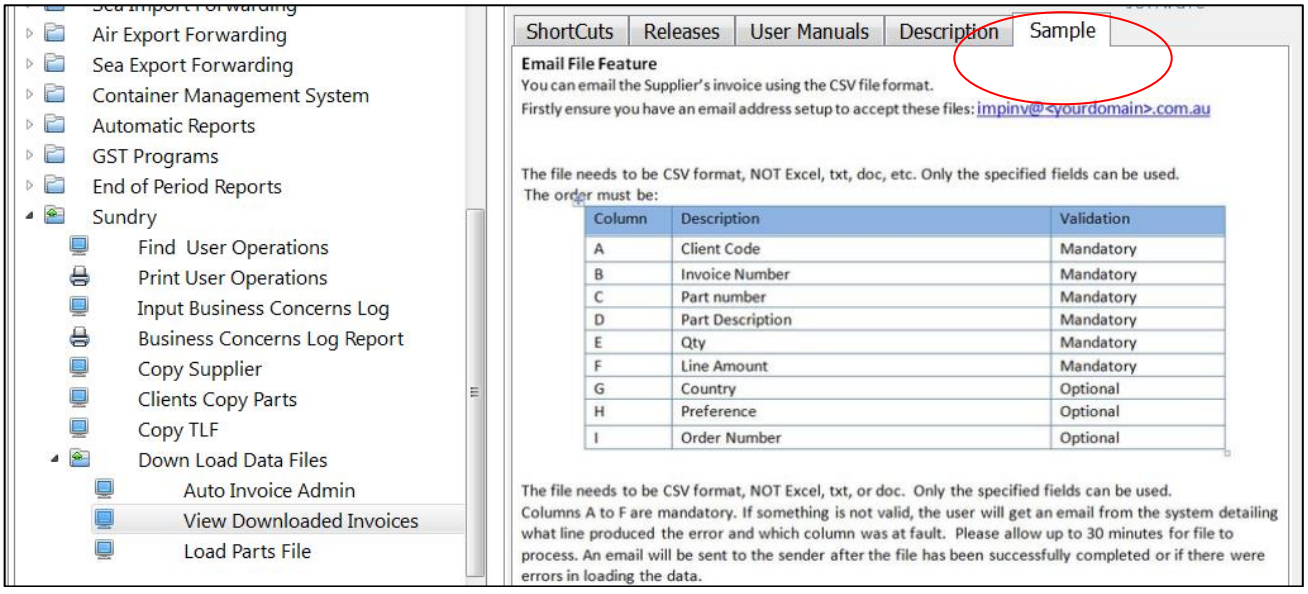
Menu Descriptions/Samples

Most Screens and Reports that appear on the menu contain a short description of what that function performs, and a sample (if applicable), see below:

Description



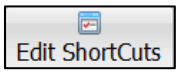
Sample


Air Export Forwarding
Sea Export Forwarding
Container Management System
Automatic Reports
GST Programs
End of Period Reports
Sundry
Find User Operations
Print User Operations
Input Business Concerns Log
Business Concerns Log Report
Copy Supplier
Clients Copy Parts
Copy TLF
Down Load Data Files
Auto Invoice Admin
View Downloaded Invoices
Load Parts File
ShortCuts
Releases
User Manuals
Description
Sample
Email File Feature
You can email the Supplier's invoice using the CSV file format.
Firstly ensure you have an email address setup to accept these files: impinv@<yourdomain>.com.au
The file needs to be CSV format, NOT Excel, txt, doc, etc. Only the specified fields can be used.
The order must be:
Column | Description | Validation
A | Client Code | Mandatory
B | Invoice Number | Mandatory
C | Part number | Mandatory
D | Part Description | Mandatory
E | Qty | Mandatory
F | Line Amount | Mandatory
G | Country | Optional
H | Preference | Optional
I | Order Number | Optional
The file needs to be CSV format, NOT Excel, txt, or doc. Only the specified fields can be used.
Columns A to F are mandatory. If something is not valid, the user will get an email from the system detailing what line produced the error and which column was at fault. Please allow up to 30 minutes for file to process. An email will be sent to the sender after the file has been successfully completed or if there were errors in loading the data.

Shortcuts

This is a list of quick links to screens and reports that you use most often. The list also includes links to 3rd party websites and process statuses.

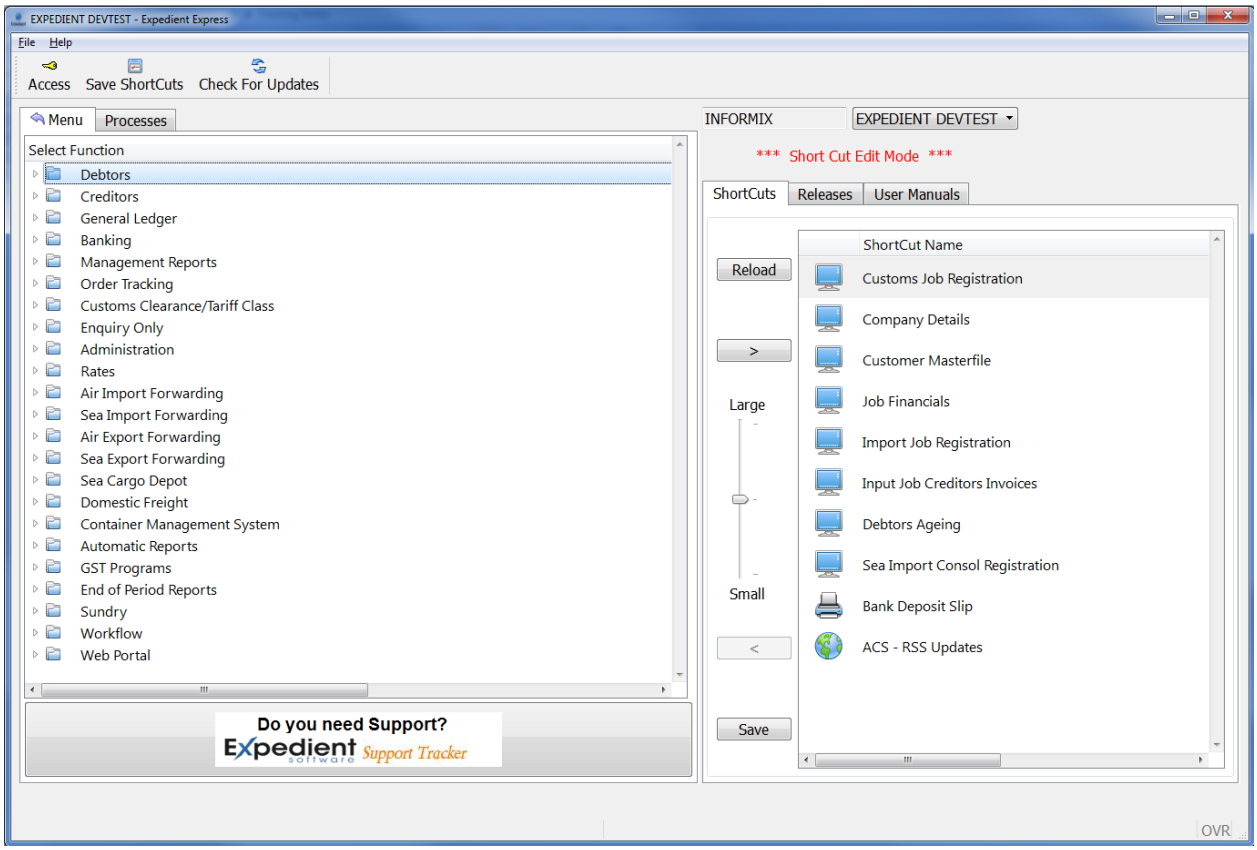
If you are a new user there will be no shortcuts. These will appear the second time a new user logs in.

This list is customisable by clicking on the 

button in the toolbar.

Edit Shortcuts

The edit mode displays the full Menu structure on the left with a second tab of Processes. The menu and processes listed will be dependent on the modules your site subscribes to and your user access level.



Menu items

Menu items that can be added to the short cuts list include screens, document printing, report printing, posting and preparation functions.

Processes

Processes that can be added to the short cuts list include scheduled processes like backups, communications with 3rd parties, monitoring options such as user limit and system load, some screens highlighting where urgent action is required and links to useful contacts e.g. Customs and Expedient Support Tracker

The icons used as are follows:

- scheduled processes

- links to screens

- external internet link

The status of scheduled processes will be indicated with a 'traffic light' system and a short text description to alert you to any issues.

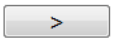
In the edit mode there are a number of ways you can add, remove and reorder items in the shortcuts list.

Drag and drop

Use the mouse to pick up and drag a menu or process item and place into the shortcut list. Point the cursor where you want to place the item in the list and release the mouse. You can also remove items from the shortcuts list with drag and drop.

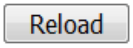
Items already in the list can be dragged and dropped within the list to change the order.

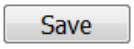
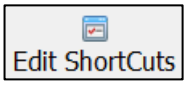
Add/Remove buttons

Click on a Menu or Process item and click the  button to add the item to the bottom of the short cuts list.

Click on the Menu or Process item in the short cuts list and click the button to remove the item from the short cuts list.

The icons can be resized to your preference using the sliding scale.

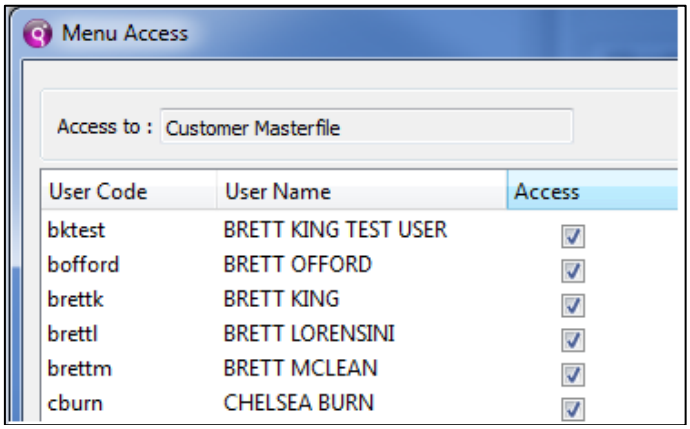
The  button will reset your short cut list to the screens you access most often. The list will be followed by the ACS-RSS Updates website, if you are based in Australia, which provides easy access to Customs alerts. This link is a permanent item on your shortcuts list.

To save and exit the Edit Shortcuts mode click the  or  button. Any changes will be saved automatically.

Access

The access button

allows all users to view what Menus / Programs users have access to: Clicking on the Access Button when the Customer Masterfile Menu is highlighted shows the below:

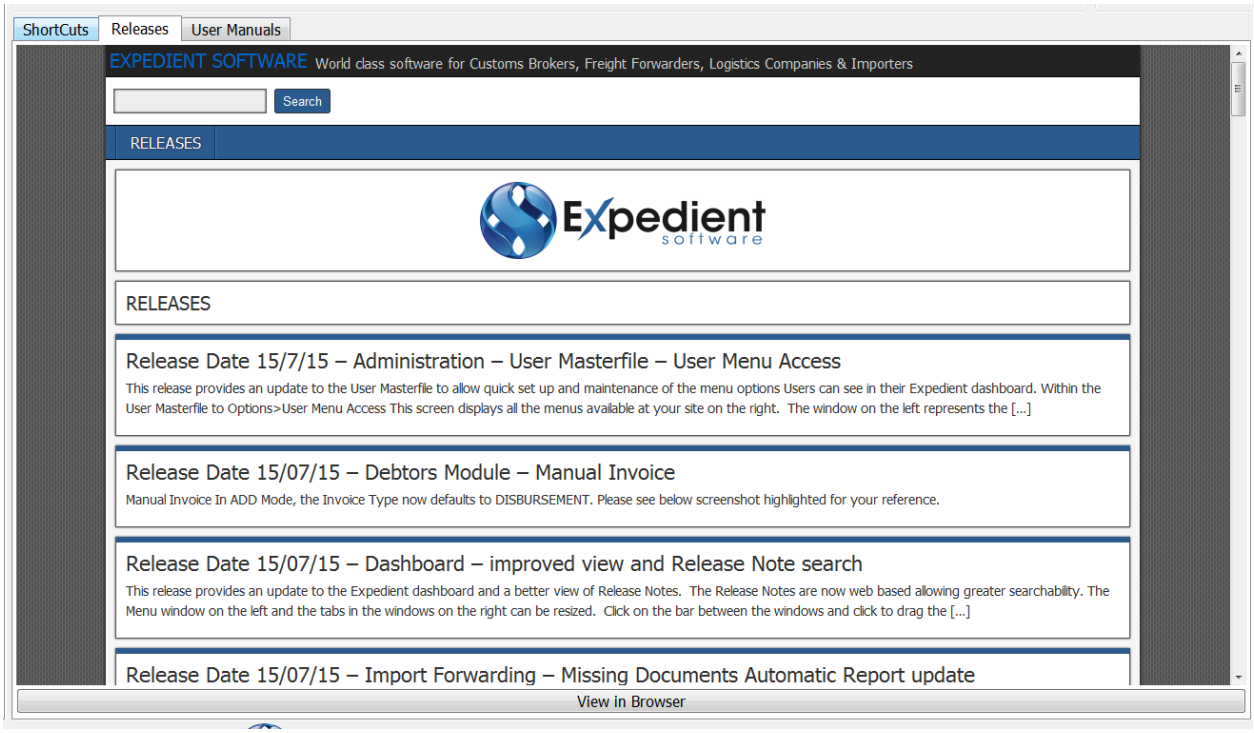


Check for Updates

This button allows users to update their Expedient Software Application is up to date.

Please Note: this is only the look and feel of the application, not the actual functionality is affected. For functionality updates see the Releases Tab on the Main Menu

Releases


ShortCuts
Releases
User Manuals
EXPEDIENT SOFTWARE World class software for Customs Brokers, Freight Forwarders, Logistics Companies & Importers
Search
RELEASES
Expedient software
RELEASES
Release Date 15/7/15 – Administration – User Masterfile – User Menu Access
This release provides an update to the User Masterfile to allow quick set up and maintenance of the menu options Users can see in their Expedient dashboard. Within the User Masterfile to Options>User Menu Access This screen displays all the menus available at your site on the right. The window on the left represents the [...]
Release Date 15/07/15 – Debtors Module – Manual Invoice
Manual Invoice In ADD Mode, the Invoice Type now defaults to DISBURSEMENT. Please see below screenshot highlighted for your reference.
Release Date 15/07/15 – Dashboard – improved view and Release Note search
This release provides an update to the Expedient dashboard and a better view of Release Notes. The Release Notes are now web based allowing greater searchability. The Menu window on the left and the tabs in the windows on the right can be resized. Click on the bar between the windows and click to drag the [...]
Release Date 15/07/15 – Import Forwarding – Missing Documents Automatic Report update
View in Browser

This tab displays the most recent Release Notes detailing any recent changes to Expedient. We recommend these are read regularly so you are notified of any changes.

The information is arranged in Notes on each topic. The title of each Note includes the date the change has been made available in Expedient, the area of Expedient affected and a brief description of the change e.g. 'Release Date 15/07/15 – NZ Import Forwarding – Documents Screen pop up'. This is followed by text with a more expansive description of the change. Click on the Release Note title to view the full Release Note.

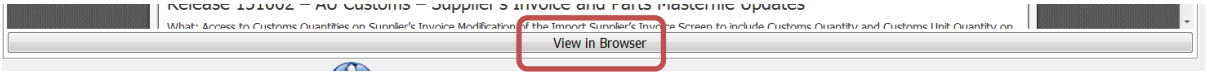
The most recently published Release Notes will be shown at the top of the Release Notes list. Any changes available in the next release will be shown at the top of the list for easy reference for coming changes.

After viewing the Release Note click on the Release button at the top of the Release Notes tab to return to the list of Release Notes

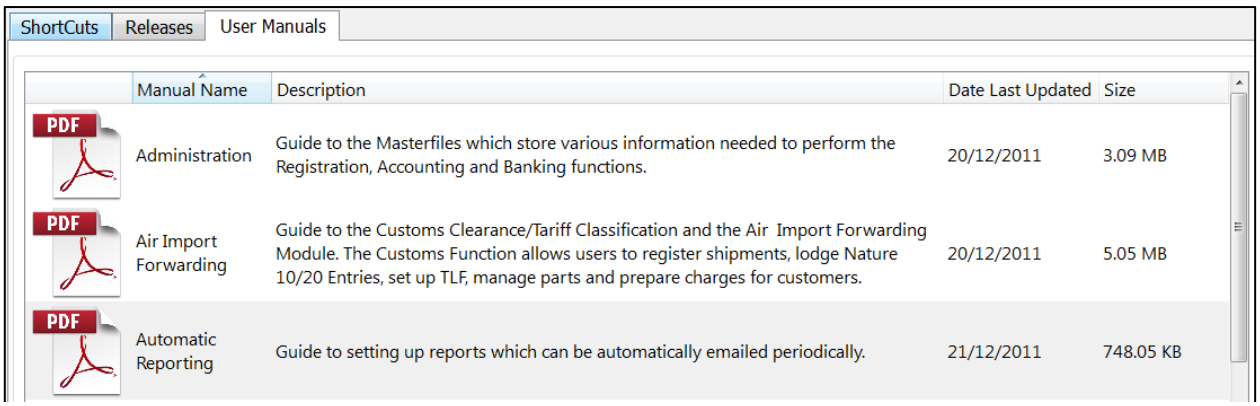
Search Release Notes by entering the text to search for and click

. Expedient will look for the text in all published Release Notes and show the most relevant search at the top of the results.

Use the 'View in Browser' button to open a view of all the published Release Notes in a separate Browser window.



User Manuals


ShortCuts
Releases
User Manuals
Manual Name
Description
Date Last Updated
Size
PDF
Administration
Guide to the Masterfiles which store various information needed to perform the Registration, Accounting and Banking functions.
20/12/2011
3.09 MB
PDF
Air Import Forwarding
Guide to the Customs Clearance/Tariff Classification and the Air Import Forwarding Module. The Customs Function allows users to register shipments, lodge Nature 10/20 Entries, set up TLF, manage parts and prepare charges for customers.
20/12/2011
5.05 MB
PDF
Automatic Reporting
Guide to setting up reports which can be automatically emailed periodically.
21/12/2011
748.05 KB

This tab displays the User Manuals for Expedient. The manuals are also available from the screens they relate to.

The information displayed is as follows

Icon	This will open the User Manual in your internet window
Manual Name	This is the name of the manual. This column can be sorted
Description	This is a short introduction to the manual
Date last updated	This is the date the Manual was last updated. This column can be sorted

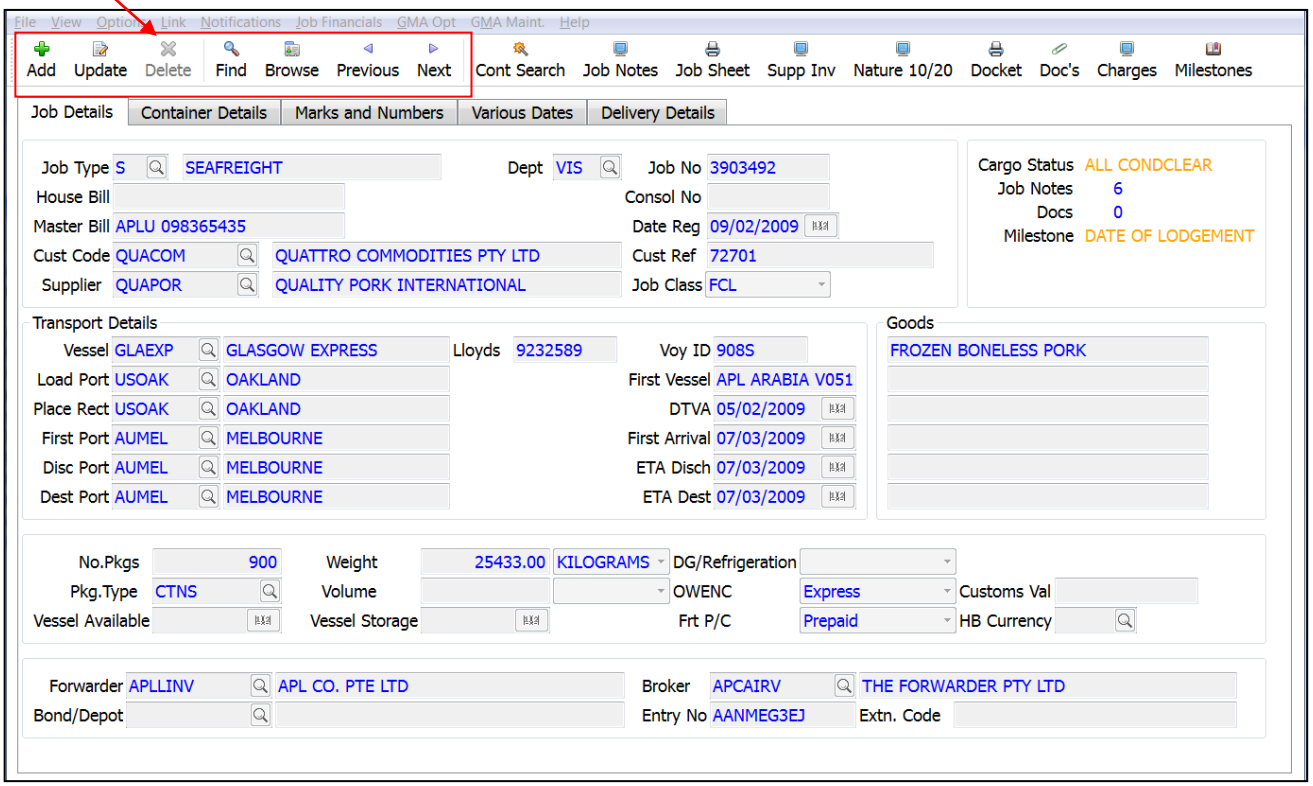
Multiple Sessions

Each user has the ability to utilise multiple screens under the single logon. For example a user can open the Import Job Registration Screen and search for a job. If they then need to search for a customer in the Customer Masterfile they can remain in the Import Job Registration Screen and return to the Main Menu and go into the Customer Masterfile and perform a search.
The below screen shot displays three Expedient Windows, the Main Menu, the Job Registration Screen and the Customer Masterfile. A user can click on each window to return to that function.

Screen Layout

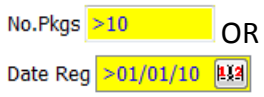
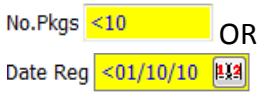
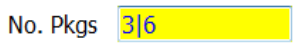
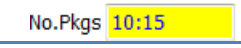
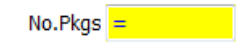
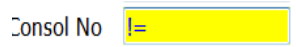
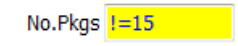
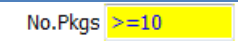
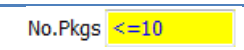
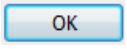
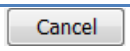
All screens have a consistent look and feel. The toolbars, symbols and shortcut buttons are all consistent on each screen ensuring users gain an understanding and confidence of the system in a short period of time. See the below screen for an explanation of the layout.

The below 7 buttons are standard across all input screens. See below for keyboard shortcuts.



Finding a Record

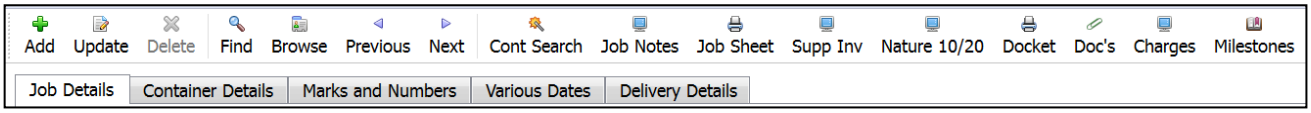
The Expedient System allows users to search any field within an input screen that has a white background. Fields with grey backgrounds are for display purposes only and cannot be searched. The below table outlines the various use of key strokes that assist users in searching.

Character	Description	Example
>	Greater than or after a specific date	
<	Less than or before	
|(pipe)	Used to search two or more variables. Will search for any record with 3 or 6 Packages	
:	Used between two or more variables to specify a range. Will search for records with No.Pkgs **between** 10 and 15	
*****	Used before, after or between a variable to designate a wildcard. Will search for records where customer code starts with SAMP	
?	Used before, after or between a variable to designate a single character wildcard	
=	Used to find an empty field. Searches records where No.Pkgs is null	
!=	Used to exclude a variable. Searches records the Consol No is not null	
!=	Used to exclude a variable. Searches records where No.Pkgs does not equal 15	
>=	Greater than or equal to	
<=	Less than or equal to	
	**Save** - Clicking on this button will begin a search of the records for the data you have input.	Enter
	**Cancel** - Clicking on this button will exit search mode	Esc

Exiting a Screen

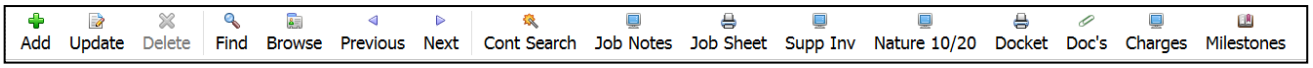
When exiting a screen you can either click on the X Button in the top right section of the screen, or select File – Exit from the Menu.

Please note: when clicking on the X button, you must be in the first tab of the screen. In the example below, the user can use the X button as he/she is in the Job Details tab, this being the first tab.



Buttons and Shortcuts

The Expedient System allows users to utilise 2 forms of screen navigation, the use of the mouse through buttons, and the use of keyboard via shortcut keys. Button shortcuts use the First Letter of the button where possible.



The below icons highlight each action and shortcut within an input screen.

Icon	Description	Shortcut Key
Add	Clicking on this button will place users in the input screen in Add Mode. This will allow them to add a new record. i.e.: New Job	A
Update	Clicking on this button will place users in the screen in Update Mode. This will allow the user to update the current record. This button will only be displayed if a record is displayed on the screen.	U
Delete	Clicking on this button will Delete the current record displayed on the screen. This button will only be displayed if a record is displayed AND you have the authority to delete records.	D
Find	Clicking on this button will Find a record. Users can search for a record by entering data in any field within the screen that is not grey.	F
Browse	Clicking on this button will Browse the selected records. This allows the user a quick view of the selected records. This button will only be displayed if a record is displayed on the screen.	B
Previous	Clicking on this button will take the user to the previous record. This is only applicable when there is more than one record displayed in the record counter.	P
Next	Clicking on this button will take the user to the next record. This is only applicable when there is more than one record displayed in the record counter.	N
OK	Clicking on this button will save the record when updating or adding a record. This will also execute a find command.	Enter
Cancel	Clicking on this button will take the user out of input, find or update mode without saving or search the record.	Esc
	Clicking on this button will take the user to a Masterfile Look Up Screen.	CTRL + Z
Re-Query	Clicking on this button will allows users to perform a new Search	F5
Insert	Clicking on this button will allows to insert a new record within a table (i.e.: Supplier's Invoice or Debtors Invoice Screen)	F3

Icon	Description		Shortcut Key
Delete	Clicking on this button will allows to delete a record within a table (i.e.: Supplier's Invoice or Debtors Invoice Screen)		F2
Icon	Action	Description	Shortcut Key
N/A	Move to next field	To navigate to the next input field, the user can click on the field they wish OR use the tab key on the keyboard.	**Tab**
Job Details Container Details →	Move to Next Screen Tab	Clicking on the Screen Tabs will change screens	**Ctrl-Tab**
	Date Edit	Clicking on this button will bring up a calendar so the user can select a date	**N/A**
		Detail only	
N/A	Insert Line	Allows the User to insert a line where the cursor is currently positioned	
N/A	Delete Line	Allows the User to delete the current line on which the cursor is currently positioned	**F2**
N/A	Move Lines Down	Allows the User (whilst in the DETAIL section) to move the cursor down to the next block of entries	**F3**
N/A	Move Lines Up	Allows the User (whilst in the DETAIL section) to move the cursor up to the next block of entries	**F4**

Accessing Toolbars/Buttons

The toolbars are located on the top of each screen. An example of a toolbar can be seen below:

To access these toolbars you have two choices:

Using the Mouse

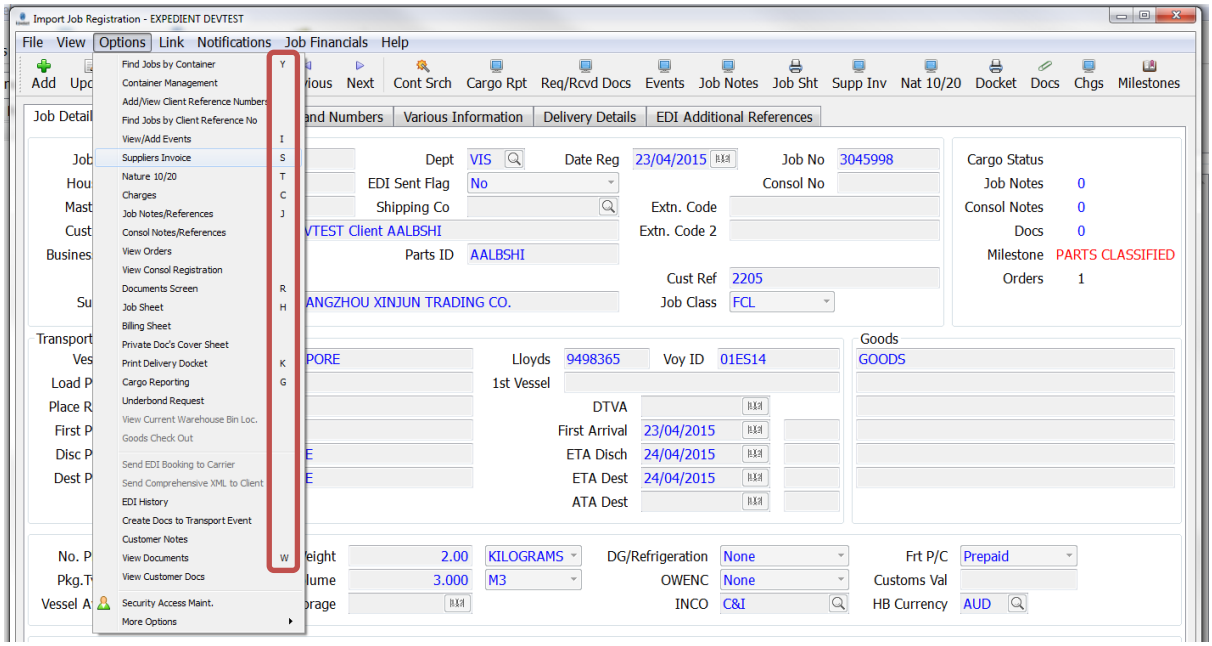
Simply click on the Toolbar and the options will drop down.

Using the Keyboard

Expedient allows Shortcut Keys using 'Alt' and the underlined letter on the toolbar. This will open the pull down menu where you can then select 'Shift" and the underlined letter to go to the required option.

Within the pull down menus capital letter indicate the Shortcut Keys that will open screens. These are related to the toolbar buttons within the screen.

For example, within the Import Job Registration screen pressing 's' will open the Supplier Invoice screen if you are viewing a Job.



Pressing 't' in the Import Job Registration when you are viewing a Job will open the Nature 10/20 screen.

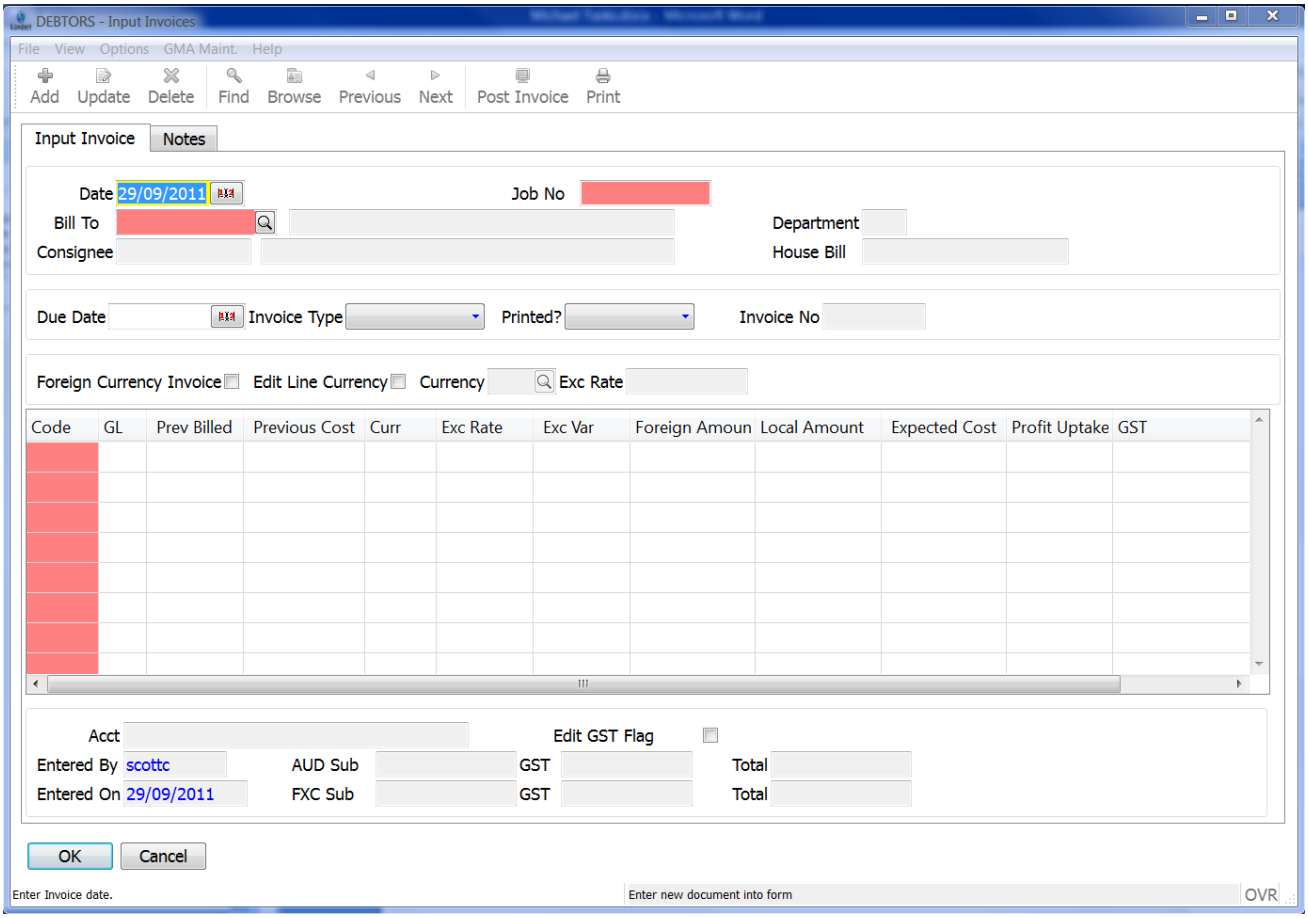
Similar Shortcut Keys are found in all screens in Expedient. View the pull down menus to find out which Shortcut Keys open screens.

Adding/Updating a Record

The Expedient System allows users to input data using either the keyboard or mouse to navigate. When a user clicks on Add/Update (A/U on the keyboard) they will be taken in to Input Mode on the screen. See the below header screen.

Header Screen

Header / Detail Screen

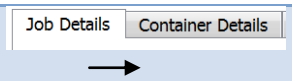
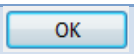
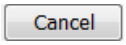


Right Clicking on the Headings will allow users to perform the following:

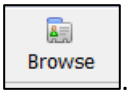
- Choose the Columns to Display *(some screens enforce some fields to always display)*
- Reset the Sort Order *(double clicking on some column heading will sort the data by that column)*
- Adjust Size *(this ensures each field fits the relevant line data)*
- Reset to Defaults

Field Navigation

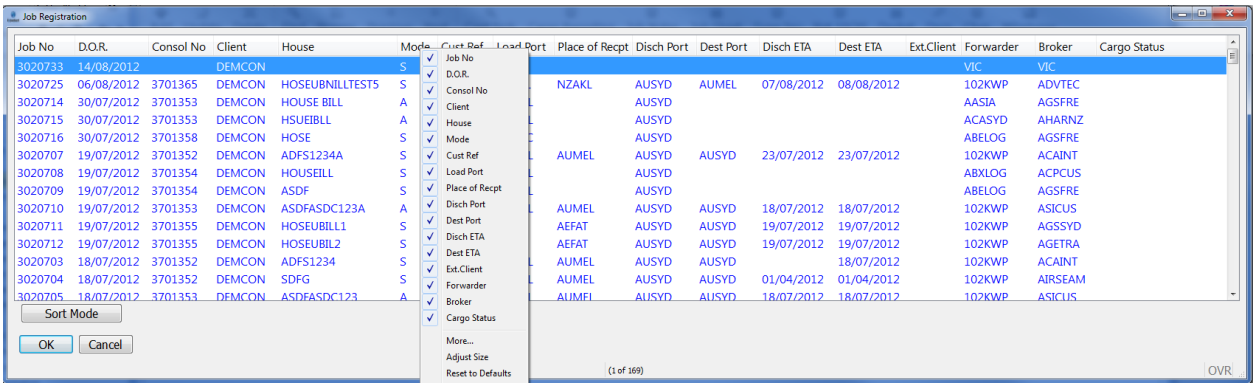
The following icons that appear on input/report screens are explained below.

Icon	Action	Description	Shortcut Key
N/A	Move to next field	To navigate to the next input field, the user can click on the field they wish OR use the tab key on the keyboard.	**Tab**
	Lookup	Clicking on this button will bring up the relative master file screen in which you can search. For example, if you are not sure what the client code is for a particular customer is, you can perform a lookup and search for the business name.	**Ctrl-Z**
	Move to Next Screen Tab	Clicking on the Screen Tabs will change screens	**Ctrl-Tab**
	Date Edit	Clicking on this button will bring up a calendar so the user can select a date	**N/A**
	Save	Clicking on this button will save the current record	**Enter**
	Cancel	Clicking on this button will exit input mode for the current record and not save any changes	**Esc**
		Detail only	
N/A	Insert Line	Allows the User to insert a line where the cursor is currently positioned	**F1**
N/A	Delete Line	Allows the User to delete the current line on which the cursor is currently positioned	**F2**
N/A	Move Lines Down	Allows the User (whilst in the DETAIL section) to move the cursor down to the next block of entries	**F3**
N/A	Move Lines Up	Allows the User (whilst in the DETAIL section) to move the cursor up to the next block of entries	**F4**

Browsing Records

Once users have searched for records within a screen, Expedient provides the ability to browse those records in a summary list format, using the Browse Button. 

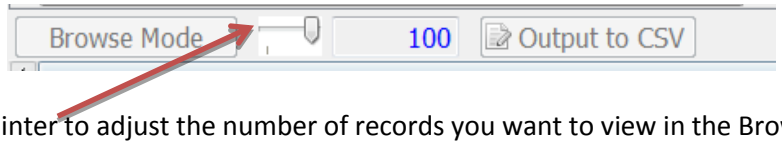
Users have the ability to set which fields they want to see each time they use that particular screen. Right click on the headings to select which columns you wish to see. You can also amend the order of the columns by click and dragging a column heading to a new position. See below:



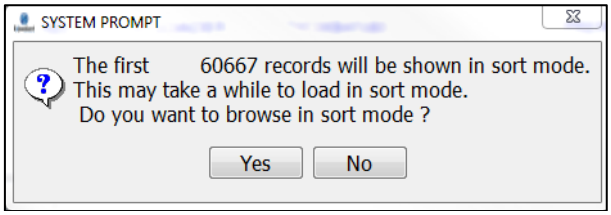
Sort Mode

Click on the Sort Mode button in the Browse screen to enter Sort Mode.

The Sort Mode button now becomes the Browse Mode button



Click on the sliding pointer to adjust the number of records you want to view in the Browse screen.
Click on OK. You may get a warning message if you want to view a large number of records

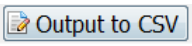

SYSTEM PROMPT
The first 60667 records will be shown in sort mode.
This may take a while to load in sort mode.
Do you want to browse in sort mode ?
Yes
No

Click on Yes or No to remove the warning message.
Click on OK to adjust the number of records to match your request.

You will now be able to sort the data by clicking on the column headings in the Browse window.

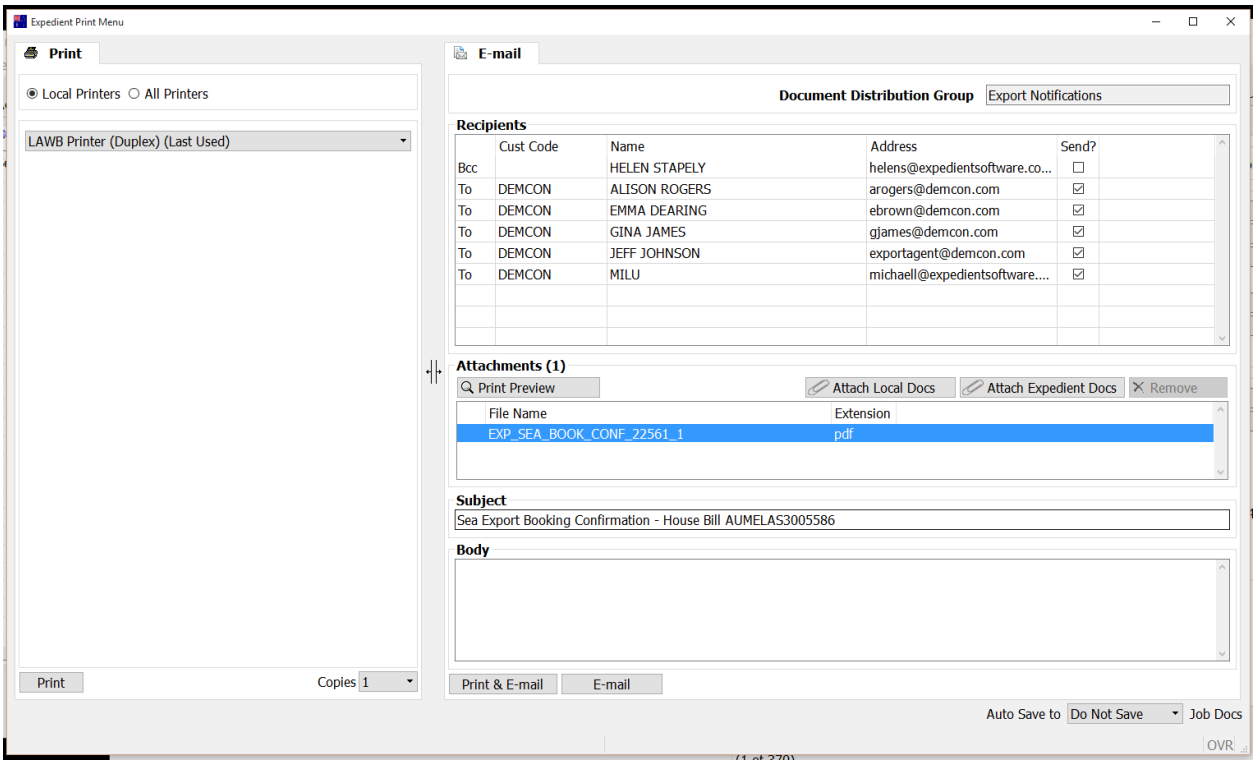
One click on the column header sorts A to Z or numbers ascending. Two clicks on the column header sort Z to A or numbers descending.
For example, to sort all the consols by Registration Date with the most recent at the top click twice on the column heading 'Regist Date'.

Browse Output to CSV

You can download the sorted data to a .csv file which you can further manipulate in Excel. Click on  to download the .csv file.

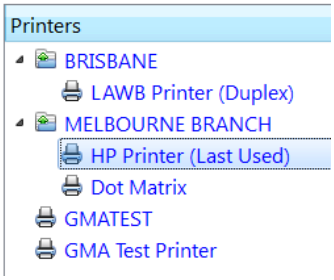
Printing Documents

The Expedient System allows users (not available via Cloud Solution) to print and email documents from a Print Menu.



[See the Expedient Software YouTube channel for a demonstration of the Print Menu]

The left hand side of the screen displays the available printers. The last printer you used will be defaulted unless you are printing a document which requires a specific printer. Click on to view the list of available printers at your branch. If you want to print to another branch click in to view and select from all available printers in your company

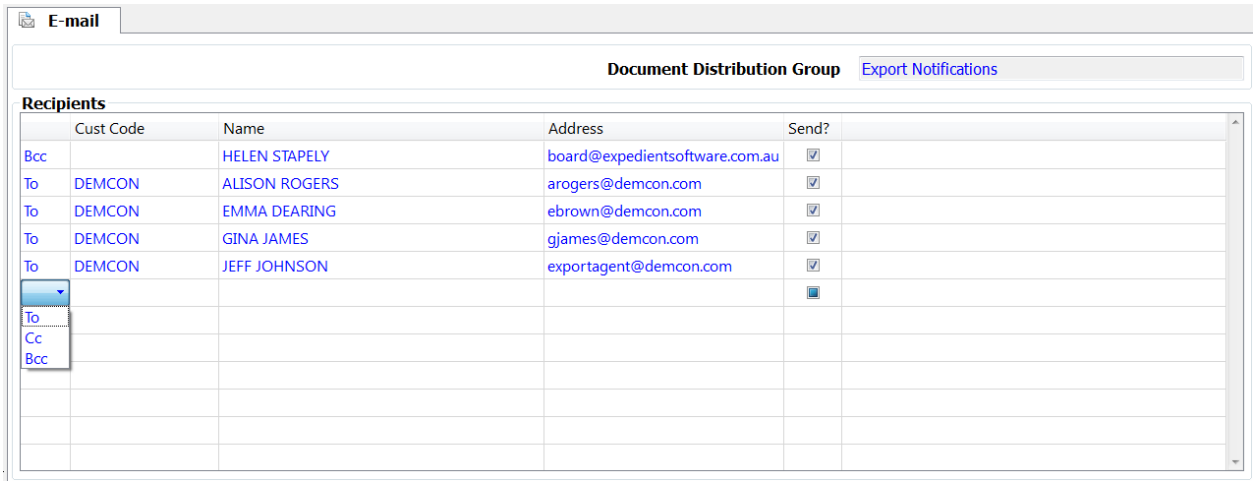


Adjust the number of copies by select a number from the Copies pull down list, . You can select up to 10 copies.

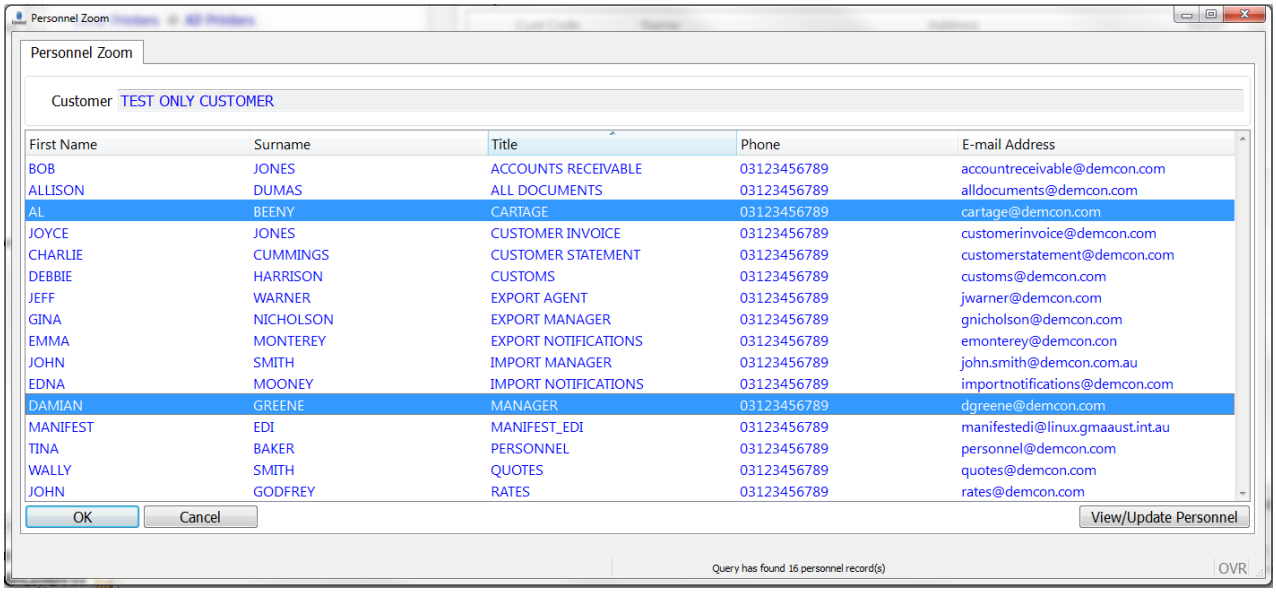
Use button to send the document to the selected printer.

Emailing Documents

The Expedient System allows users to email documents from the Printer Menu. The email details are on the right hand side of the Print screen. If you are producing a document that goes to external contacts and you have set up contacts to receive that document already you may see email addresses in the distribution list. Please refer to the Administration manual for guidance on Documentation Distribution Groups.



Add email addresses by clicking in the first cell of the next blank row in the Recipients table. This provides a pull down list so you can select how the email is sent. Click in the next cell for Cust Code. Use to search for a customer or enter a customer code. In the next column, Name, use to find all available active contacts for the Customer.



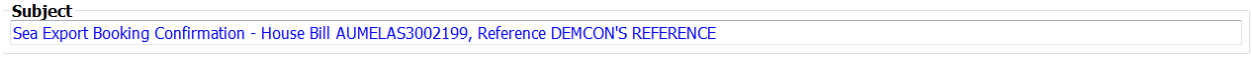
Double click on the name you want to select. If you need to change the email address or any other details for the contact use to access the Personnel Contact screen.

Multiple contacts can be selected from this screen by holding down the Ctrl key while you are selecting contacts, as shown in the screen shot above. On clicking OK all names selected will be inserted in the Recipient List.

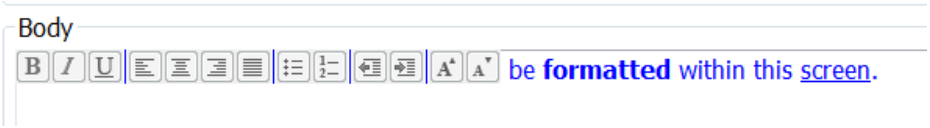
Manually type in an email address by clicking in a blank row in the Address column. Untick the Send? box if you do not want the contact included in the email distribution.

Your name will be automatically inserted at the top of the list in blind copy.

Enter the Subject line for the email. If you are producing a document that goes to external contacts the Subject line will show the title of the document and some references for the job or client.



Covering text for the document can be entered in the Body section of the screen. This text can be formatted by hovering the mouse over the word 'Body' until a formatting toolbar appears.

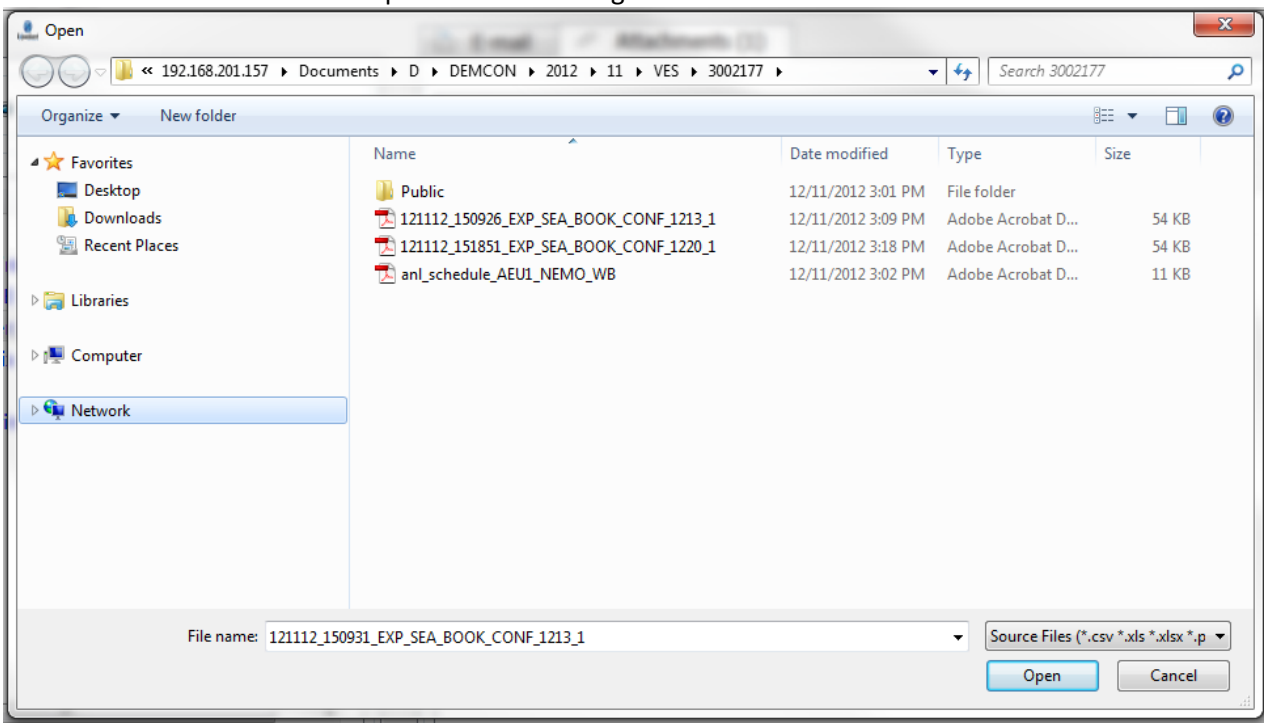


A default email signature can be added to your User Masterfile so that the same signature automatically appears in every email.

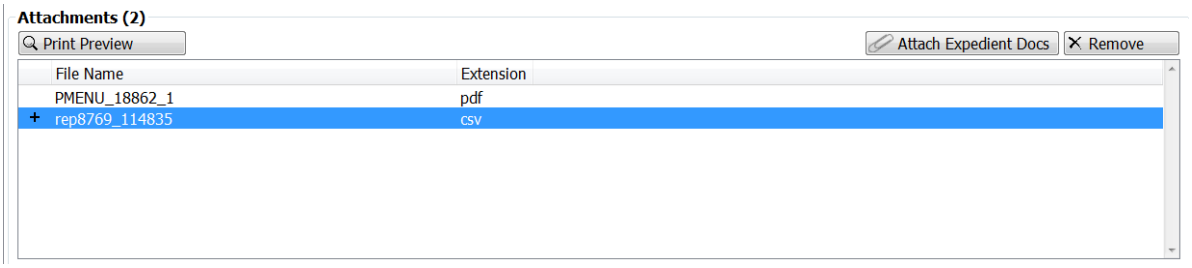
Attachments and Preview

The Attachments section shows the documents that will be sent with the email. Highlight the document and use Print Preview to view the document before sending.

Further documents can be added to the email by using Attach Local Docs or buttons. The Attach Expedient Docs button opens a screen listing documents attached to the Job or Consol.



Select the document you want to attach from the list. The selected document will be added to the Attachments list.



Use Remove to prevent the unwanted attachment going out with the email.

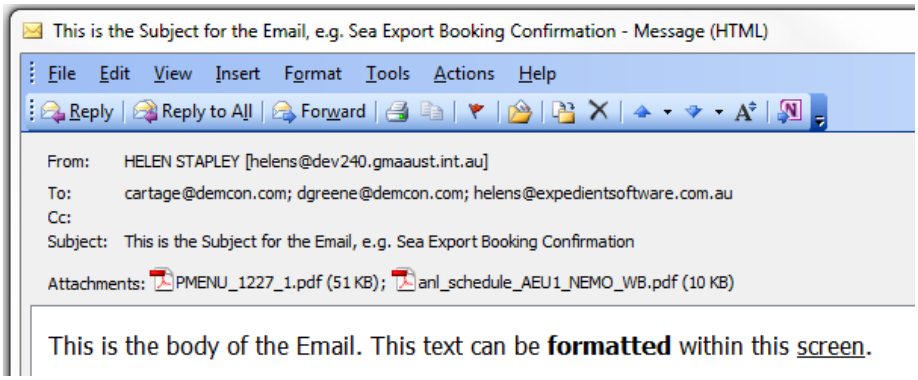
Auto Save

Set the document to save to a shared folder for the job or consol to allow other users to access the document.

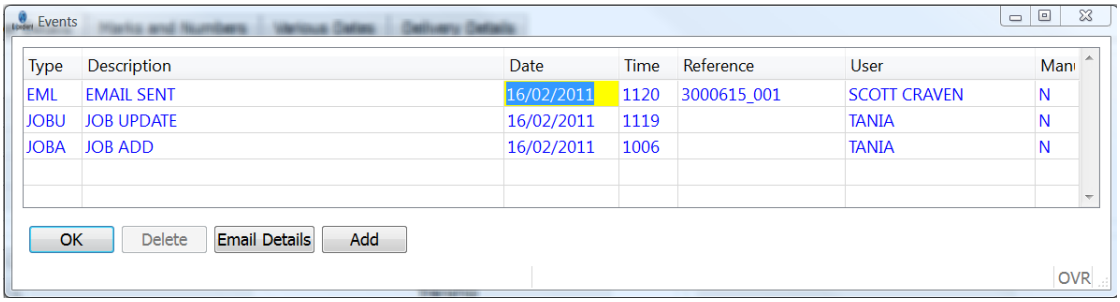
Select Private to save the document to folder accessed only by your company or Public to share the documents in the web portal with your customer. Based on the type of document Expedient will save the document to the appropriate Docs folder.

When the Email details are completed use E-mail to send the email with attachments or use Print & E-mail to produce a hard copy as well as an email.

An example of the email sent is shown below


This is the Subject for the Email, e.g. Sea Export Booking Confirmation - Message (HTML)
File Edit View Insert Format Tools Actions Help
Reply Reply to All Forward
From: HELEN STAPLEY [helens@dev240.gmaaust.int.au]
To: cartage@demcon.com; dgreene@demcon.com; helens@expedientsoftware.com.au
Cc:
Subject: This is the Subject for the Email, e.g. Sea Export Booking Confirmation
Attachments: PMENU_1227_1.pdf (51 KB); anl_schedule_AEU1_NEMO_WB.pdf (10 KB)
This is the body of the Email. This text can be formatted within this screen.

If the email was generated from either an Import Job Registration or Export Job Registration screen then the email will be logged in the Events Table. To view the email events users will need to enter this screen via Options in the Job Registration Screen. The below screen will display:



To find out the further information on who was sent the email and the Subject of what the document was then click on the Email Details button. The below screen will appear: